

Development Officer - Advanced Rights

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Development Officer



The information included in this user guide is specific to the Development Officer role in **ResearchPoint**. It includes information and procedures about only those features available to the development officer role.

My Fundraiser Page

The Development Officer's fundraiser page displays all research request information submitted by the associated officer. This page is accessed by clicking **My fundraiser page** from the Prospects page.

Note: For the **My Fundraiser page** link to work, the Development Officer's **Application User** must be linked to a constituent in the system and the constituent must have a constituency of "Fundraiser." Your system administrator must complete this configuration before your **My fundraiser page** link will work.

Add New Prospects

You can manually add new prospects from the Prospects page.

Tip: The best way to add new prospects is from the Search page. This enables you to first search for the prospect to confirm he does not exist in your database. If the prospect does not exist, you can then quickly add him and run a wealth screen, all from the same location.

➤ Add an individual prospect

1. From the Prospects page, under **Prospect research**, click **Add an individual**. The Add an individual screen appears.
2. Complete as many fields as possible.
3. Click **Save** to save the new record and close the Add an individual screen.

Add a New Prospect and Screen

If the search for new prospects did not find your person, you can still add them and perform a WealthPoint screening.

➤ Individual Tab

Enter as much name and contact information as you know about the prospect. Enter the name of the individual exactly as it should appear throughout your database, such as on pages and reports. Enter a

nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria. If you are unsure of the exact birth date, you can enter a "fuzzy" date, such as the month and year or the year only. If the date contains a year, the constituent's age is calculated and displayed.

> Household Tab

If known, enter the household and relationship information for the prospect. To quickly find a constituent in the **Related individual** field, enter the name of the constituent and press **TAB**. If the program matches the name to a constituent in the database, the constituent's name appears in the field. If the program matches the name to multiple constituents, the Individual Search screen appears and displays the matched records in the **Results** grid. Select the correct constituent or start a new search. If the individual is not already a constituent in the database, you can add the constituent from the search screen.

> Business Tab

If known, enter the business and employment information for the prospect. To quickly find an organization in the **Related organization** field, enter the name of the business and press **TAB**. If the program matches the name to an organization in the database, the organization's name appears in the field. If the program matches the name to multiple organizations, the Organization Search screen appears and displays the matched records in the **Results** grid. Select the correct organization or start a new search. If the organization is not already a constituent in the database, you can add the constituent from the search screen.

Individual Tab

The table below explains the items on the Individual tab of the Add an individual screen.

Note: Some of these fields also appear on a simplified "Add an individual" screen accessed from certain areas of the program, such as some constituent search screens.

Screen Item	Description
Last name, First name, Middle name	Enter the name of the individual exactly as it should appear throughout your database such as on pages and reports.
Title and Title 2	Select a title for the individual such as Mr., Mrs., or Ms. You can select a second title if necessary such as "Reverend Dr."
Suffix and Suffix 2	Select a suffix for the individual such as Sr. or M.D., as necessary. You can select a second suffix if necessary, such as "III Esq."

Screen Item	Description
Nickname	Enter a nickname for the individual as necessary. When you search for individual constituents, you can select to include nicknames in the search criteria.
Maiden name	Enter a maiden name for the individual as necessary. On the constituent record, the maiden name entered appears as an alias on the Names tab. When you search for individual constituents, you can select to include maiden names in the search criteria.
Marital status	Select whether the individual constituent is single, married, or divorced.
Birth date and Age	Enter the individual's date of birth, such as 10/10/1941. If you are unsure of the exact birth date, you can enter a "fuzzy" date, such as the month and year or the year only. If the date contains a year, the constituent's age is calculated and displayed.
Gender	Select whether the individual is a male or female. If you are unsure of the individual's gender, select Unknown.
Address type	Select the type of address to use as the primary contact for the individual, such as Home or School Residence. When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab.
Country	Select the country of the individual's primary address.
Address	Enter the primary street address or post office box for the individual.
City	Enter the city or town for the individual's primary address.
ZIP	Enter the Zip code for the individual's primary address.
Do not send mail to this address	If the individual requests that you not send mail to the primary address, select this checkbox.
Reason	If you select Do not send mail to this address , select why the constituent requests to not receive mail at the primary address.
Phone type	Select the type of phone number to use as the primary contact for the individual, such as Home or Business. When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab.
Phone number	Enter the primary phone number for the individual. If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the <i>Administration Guide</i> . If phone formatting is disabled, you can manually enter the phone number as it should appear.

Screen Item	Description
Email type	Select the type of email address to use as the primary contact for the individual, such as Personal or Business. When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab.
Email address	Enter the primary email address for the individual. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the individual.
Information source	Select the information source for the contact information, such as "Family member." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent.

Household Tab

The table below explains the items on the Household tab of the Add an individual screen.

Screen Item	Description
Full name	Search for the individual to add as a spouse or household member. To quickly find the constituent, enter the name of the constituent and press TAB . If the program matches the name to a constituent in the database, the constituent's name appears in the field. If the program matches the name to multiple constituents, the Individual Search screen appears and displays the matched constituents in the Results grid. Select the correct constituent or start a new search. If the individual is not already a constituent in the database, you can add the constituent from the search screen. If you know the individual is not already a constituent, click Add in this field to add the constituent.
Copy Individual's primary contact information to Household Member	When you save the new individual constituent, the program automatically generates or updates a record of the constituent household with the individual. To copy the primary contact information of the individual constituent to the record of the household, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab.
Individual is the	Select the relationship the individual has with the household member, such as Husband, Wife, or Partner.

Screen Item	Description
Spouse is the	Select the relationship the household member has with the individual, such as Husband, Wife, or Partner.
Start date	Enter the date the relationship between the individual and household member began such as the wedding date of a spouse relationship, or enter the date you enter the relationship into your database.
This is the spouse relationship for Individual	If the household member is the spouse or partner of the individual, select this checkbox.
Copy Individual's primary contact information to Spouse/Household Member	To copy the primary contact information of the new individual constituent to the record of the new constituent household member or spouse, select this checkbox. On the constituent record, the primary contact information appears on the Contact tab.

Business Tab

The table below explains the items on the Business tab of the Add an individual screen.

Screen Item	Description
Organization name	<p>Search for the organization to add as a business for the individual.</p> <p>To quickly find the constituent, enter the name of the organization and press TAB. If the program matches the name to an organization in the database, the organization's name appears in the field. If the program matches the name to multiple organizations, the Organization Search screen appears and displays the matched organizations in the Results grid. Select the correct organization or start a new search.</p> <p>If the organization is not already a constituent in the database, you can add the constituent from the search screen.</p> <p>If you know the organization is not already a constituent, click Add in his field to add the constituent.</p>
Individual is the	Select the relationship the individual has with the organization, such as Employee.
Organization is the	Select the relationship the organization has with the individual, such as Employer.
Start date	Enter the date the relationship between the individual and organization began such as the date the organization hires the individual, or enter the date you enter the relationship into your database.
End date	Enter the date the relationship between the individual and organization ends, such as the date the individual resigns from the organization. If the relationship is for an undetermined duration, leave this field blank.

Screen Item	Description
Individual is a contact	If the individual is a contact for the organization, select this checkbox.
Contact type	If you select Individual is a contact , select the type of contact of the individual for the organization, such as Corporate Donations.
Primary contact	If you select Individual is a contact , this checkbox is enabled. If the individual is the primary contact for the organization, select this checkbox. When you run communications processes that include the organization, the primary contact receives the communication.
This organization will match individual's contributions	If the organization is a matching gift company that matches donations made by the individual, select this checkbox.
Recognition credits	Under Recognition credits , select whether to apply recognition credit to the individual for revenue from the organization, or to the organization for revenue from the individual. If you select to apply recognition credit to either constituent, specify the type and percentage of recognition credit the constituent receives.
Employment information	If the organization is the employer of the individual, enter employment related information such as job title, category, and career level.

➤ **Add an organization prospect**

1. From the Prospects page, under **Prospect research**, click **Add an organization**. The Add an organization screen appears.
2. Complete as many fields as possible.
3. Click **Save** to save the new record and close the Add a organization screen.

Add an Organization Screen

The table below explains the items on the Add an organization screen.

Screen Item	Description
Name	Enter the name of the organization, exactly as it should appear throughout the program.
Industry	Select the organization's type of industry such as Health care or Education.
Parent org	If the organization is the subsidiary of another organization, click the binoculars. The Organization Search screen appears so you can find and select the organization that owns and controls the new organization.

Screen Item	Description
No. of employees	Enter the number of people employed at the organization.
No. of subsidiary orgs	If the organization is the parent organization of another organization, enter the number of companies the organization owns and controls.
Website	Enter the address to the organization's corporate website. On the constituent record, the address entered appears as a link to the organization's website.
This is a primary organization	If the location entered is the main headquarters or office of operation for the organization, select this checkbox. When you search for an organization, you can select to include only primary organizations in the search results.
Image	To add an image for the organization such as the company logo, click Choose file . The Open screen appears so you can browse to and select the image file to use. To remove an image associated with the constituent, click Clear file .
Address type	Select the type of address to use as the primary contact for the organization, such as Business. When you add a new constituent, you can add only the primary address information. On the constituent record, you can add additional addresses on the Contact tab.
Country	Select the country of the organization's primary address.
Address	Enter the primary street address or post office box for the organization.
City	Enter the city or town for the organization's primary address.
ZIP	Enter the Zip code for the organization's primary address.
Do not send mail to this address	If the organization or contact requests that you not send mail to the primary address, select this checkbox.
Reason	If you select Do not send mail to this address , select why the constituent requests to not receive mail at the primary address.

Screen Item	Description
Phone type	Select the type of phone number to use as the primary contact for the organization, such as Business. When you add a new constituent, you can add only the primary phone number information. On the constituent record, you can add additional phone numbers on the Contact tab.
Phone number	Enter the primary phone number for the organization. If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the <i>Administration Guide</i> . If phone formatting is enabled, the program applies the phone format associated with the selected country. For information about how to assign a phone format to a country, see the Administration section of the help file. If phone formatting is disabled, you can enter the phone number as it should appear.
Email type	Select the type of email address to use as the primary contact for the organization, such as Business. When you add a new constituent, you can add only the primary email address information. On the constituent record, you can add additional email addresses on the Contact tab.
Email address	Enter the primary email address for the organization. On the constituent record, the primary email address becomes a link that you can click to quickly send an email to the organization.
Information source	Select the information source for the contact information, such as "Company's website." Sources are used to help you track additional information about the reasons contact information is added or changed. The information source appears next to the new or updated contact information on the Contact tab of the constituent.

Search for a Prospect

Warning: When running a search, wildcard characters such as "%" can be used only in the advanced search options (click **Show advanced options** on the Search screen). Wildcards do not work in the basic search – **Name or ID** and **Location** fields.

1. Start on the **ResearchPoint** Home page, which is the default page when you open **ResearchPoint**. You can also click **Home** on the menu bar.
2. In the first field on the left, select where you want to search. From here you can search:
 - ResearchPoint only
 - An integrated **Raiser's Edge** database
 - The Target Analytics Prospecting database (searches limited by subscription level)
 - For a detailed description of each option, on the Search page, click the **What do these options mean?** icon.
3. In the **Name or ID...** field, enter the prospect's ID or last name information. First name

information will not return results. You do not have to provide the full name. For example, you can enter "smi" for Smith. Also, if you do know the first and last name, enter as follows: Smith, John.

Tip: Including both last name and ZIP code information improves search speeds when searching the Target Analytics database.

4. In the **Location** field, enter any location information you have for the prospect: city, state, street address.
5. Click **Show advanced search** to access additional search criteria such as nickname and age range.
6. Click **Search**. The results grid displays any records located that satisfy your search criteria.

Prospecting Database Search Results Grid

When you search for new prospects, each search result in the grid displays the prospect's full name and age with additional prospect information in tiles. To see all tiles for a search result, click **Show more**. However, you can customize which tiles display and in what order for the search results. On the right side of the Search page, next to the **Sort by** field, click the gear icon . If a tile does not display any information, no information was located for that item in the Target Analytics prospecting database.

Prospecting Database Tiles

- Biographical information: Date of birth, marital status, and occupation
- HH Members: up to 5 household members from Experian with name, date of birth, marital status, and occupation
- Addresses: If more than one found, scroll through the results.
- Confirmed Wealth: Total confirmed wealth and a value for real estate, businesses, and securities
- Giving: Largest gift and giving categories information from NOZA

Warning: A single gift associated with multiple giving categories displays in each category on the prospect's giving record. For example, if Amy Judd donates \$10,000 to the Massachusetts Eye & Ear Infirmary and the gift is associated with two giving categories - "Religion Related, Spiritual Development" and "Youth Development," the gift displays twice on Amy's giving summary record - once for each category.

- Real Estate: Real estate records from CoreLogic. If more than one, scroll through the results.
- Businesses: Business ownership association from Dun & Bradstreet. If more than one, scroll through the results.
- Securities: Securities records from Thomson Reuters. If more than one, scroll through the results.
- Demographic Models: Household mosaic, income, and discretionary spending from Experian.

Tip: If a tile contains a link, click the link to view more detailed information. For example, if you click the address link in the **Real Estate** tile, a Real estate information screen appears with all

details of the real estate record from CoreLogic. Use this information to verify this is the prospect you want to add and screen in **ResearchPoint**.

Search

Find new prospects

Show advanced search

Prospect not found? [Add a new prospect and screen now](#)

1 result(s) displayed for "Arthur Blank" in "Atlanta, GA"

Sort by: Full name

ARTHUR M BLANK (Age 71)

Confirmed Wealth	Biographical	HH Members
Confirmed wealth: \$3,164,422,516	DOB: 1/1943	STEPHANIE V BLANK
Real estate: \$30,996,481	Marital status unknown	DOB: 1971 (Age 43)
Businesses: \$0	Occupation unknown	Marital status unknown
Securities: \$3,133,426,035		Occupation unknown

Addresses (1 of 3)	Giving	Real Estate (1 of 5)
1080 W PACES FERRY RD NW ATLANTA, GA 30327	Largest gift: \$1,000,000	1080 W PACES FERRY RD NW ATLANTA, GA 30327
	EDUCATION: \$4,325,000	Value: \$13,698,600
	HOSPITAL, HEALTH CENTER: \$2,401,000	Owner: BLANK ARTHUR M
	INTERNATIONAL, FOREIGN AFFAIRS: \$2,200,000	

Businesses (1 of 5)	Securities (1 of 3)	Demographic Models
Arthur M Blank Foundation PRESIDENT	HOME DEPOT INC Chairman of the Board	Mosaic:
Company valuation: \$6,353,284	Total value: \$3,376,291,941	Household income: Over \$250,000
Ownership value: \$0	Direct value: \$3,197,570,192	Discretionary spending: \$79,262
	Indirect value: \$178,721,749	

If you find your prospect in the search results, to add the new prospect to your database, click **Screen now**. The Add new individual screen appears. On this screen, you'll also have the option to perform a WealthPoint screening when you save the record.

If you do not find your prospect in the search results, at the top of the page click **Add a new prospect and screen now**. It is possible to find wealth data for a prospect that does not appear in the Target Analytics external prospecting database search. The WealthPoint screening is a comprehensive search of all our data sources. To help find the most data, when you add a new prospect add as much information as you know about him or her. More information helps us match your prospect to records in our database and with greater confidence.

Research Lists

Research Lists are groups of individual constituents. They help you more effectively research potential prospects in batches so you don't need to qualify prospects one-by-one.

The list can be static or dynamic, depending on whether you want to enable the list to be refreshed. For example, you can save time manually adding prospects to your research list of prospects with more than one million in confirmed total assets and a high major giving capacity. When you set your research list criteria, enable the list to refresh automatically every night. Every day prospects who match your criteria are added to the list for you.

The greatest power of Research Lists is in two key features:

1. **Group WealthPoint screenings** - When you develop lists, you can focus your efforts on the constituents with the greatest capacity. You can also perform quick scans of new prospects. With the **Screen list** task, you can batch send a group of constituents through a WealthPoint screening! Whether you're looking for wealth information on a first screening or re-screening a group of prospects for new information, the group WealthPoint screening enables you to get new data more efficiently.
2. **Customizable columns** - The Members list is one of your greatest assets as a prospect researcher. The Columns button at the top of the list  enables you to select which biographical and wealth fields you want to see. Once the columns appear, you can drag and drop them into the order you want to see data. You can sort by columns. And, you can filter by columns. The filter especially helps you to identify which prospects in the list hold the greatest value to your organization. To decide which columns mean the most to you, think about which indicators on a prospect's wealth and ratings records gives you the most insight. Once the records are filtered, select the remaining records. You can then copy them to a new, separate research list or assign a prospect manager. Or, you can do the opposite. You can filter the records to find those constituents who do not provide great opportunity at this time, select the records, and then remove from your list. This enables you to narrow down your research in a more time-effective manner!

To get started with research lists, learn [how to create one!](#)

To open a research list already set up, from the Research Lists page, in the **Name** column, click the research list name link.

Access Research Lists

You access the research list functionality from *Prospects*, in the **Research Lists** section, click **View all lists**. The Research Lists page appears. You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

⌵ **Research Lists** + Add RE Add list from RE 👁 View all lists 🔍

Favorite lists		Records	Recently accessed lists		Records
All Prospects		0	Philanthropic Gifts (NOZA and DonorBank)		0
Business Ownership >=\$1M - Confirmed		0	NonProfit Affiliations (GuideStar)		0
Millionaires - Confirmed		0	Securities >= \$1M - Confirmed		0
Millionaires with >=\$5M - Confirmed		0	Millionaires - Identified		0
			All Prospects		0
<i>View all favorite lists</i>			<i>View all recently accessed lists</i>		

Warning: Only individual records can be added to Research Lists. You cannot include organizations.

Research List Criteria Fields

You can build Research Lists based on any combination of the following fields.

➤ Biographical Category Fields

List View Column	Field Type	Note
Age	#	
Any business	Text	From name of organization relationship
Any business city	Text	From address of organization relationship
Any business job title	Text	From title of organization relationship
Any business state	Text	From address of organization relationship
Any city	Text	From contact address
Any state	Checkbox	From contact address
Any ZIP	Text	From contact address
Constituency	Checkbox	Constituencies are set up in <i>Administration</i> on a code table.
Date added to system	Date	
First name	Text	
Last name	Text	
Primary business	Text	
Primary business city	Text	
Primary business job title	Text	
Primary business state	Checkbox	
Primary city	Text	
Primary state	Checkbox	
Primary ZIP	Text	
Prospect manager	Text	
RE last sync date	Date	Shows only if integrated with The Raiser's Edge.
RE linked?	Y/N	Shows only if integrated with The Raiser's Edge.
Spouse	Text	

➤ Education Category Fields

For criteria with a checkbox, you can edit the options that appear. From *Administration*, under **Data**, click **Code tables**.

List View Columns	Field Type	Notes
Any class of	#	Enter the full year.
Any college/school	Checkbox	
Any degree	Checkbox	
Any degree type	Checkbox	
Any department	Checkbox	
Any division	Checkbox	
Any education institution	Checkbox	
Any educational involvement	Checkbox	
Any program	Checkbox	
Any sub department	Checkbox	
Primary class of	#	Enter the full year.
Primary college/school	Checkbox	
Primary degree	Checkbox	
Primary degree type	Checkbox	
Primary department	Checkbox	
Primary division	Checkbox	
Primary educational institution	Checkbox	
Primary educational involvement	Checkbox	
Primary program	Checkbox	
Primary sub department	Checkbox	

> Giving Category Fields

List View Column	Field Type	Notes
First gift	\$	
First gift date	Date	
First gift designation	Text	
First gift type	Text	
Largest gift	\$	
Largest gift date	Date	
Largest gift designation	Text	
Largest gift type	Text	
Latest gift	\$	
Latest gift date	Date	
Latest gift designation	Text	
Latest gift type	Text	
Philanthropic gift category	Checkbox	
Philanthropic gift confirmed	#	
Philanthropic gift identified	#	
Philanthropic gift location	Text	
Philanthropic gift type	Text	
Philanthropic giving gift year	#	Enter the full year.
Philanthropic giving high value	\$	
Philanthropic giving low value	\$	
Political donation gift amount	\$	
Political donation gift date	#	
Political donations confirmed	\$	
Political donations identified	\$	
Total giving	\$	
Total number of gifts	#	

> Ratings Category Fields

List View Columns	Field Type	Notes
Annual giving likelihood	#	
Annuity likelihood	#	
Bequest likelihood	#	
CRT likelihood	#	
Major giving likelihood	#	
Membership likelihood	#	
Planned giving likelihood	#	
Suggested membership level range	checkbox	
Suggested membership level score	checkbox	
Target gift range	checkbox	
Target gift range score	checkbox	

> Wealth Category Fields

List View Columns	Field Type	Notes
Business company valuation	\$	
Business job title	Text	
Business confirmed value	\$	
Business identified value	\$	
Estimated wealth value	\$	
Income/compensation confirmed value	\$	
Income/compensation identified value	\$	
Last screening date	Date	
Major giving capacity value	\$	
Other assets confirmed value	\$	
Property city	Text	
Property county	Text	
Property state	Text	
Property valuation	\$	
Property ZIP	#	
Real Estate confirmed value	\$	
Real Estate identified value	\$	
Securities confirmed value	\$	
Securities identified value	\$	
Total assets confirmed value	\$	
Total assets identified value	\$	
Wealth indicators confirmed	#	
Wealth indicators identified	#	

Biographical Group Fields

List View Column	Field Type
Age Bio	#

List View Column	Field Type
Any Business	Text
Any Business City	Text
Any Business Job Title	Text
Any Business State	Text
Any City	Text
Any State	Text
Any Zip	Text
Constituencies	#
Date added to system	Date
First Name	Text
Last Name	Text
Last RE7 sync date	Date
Primary Address	Text
Primary Business	Text
Primary Business City	Text
Primary Business Job Title	Text
Primary Business State	Text
Primary City	Text
Primary State	Text
Primary Zip	Text
Prospect Manager	Text
RE7 linked?	Y/N
Spouse	Text

Educational Group Fields

List View Columns	Field Type
Any Class of	#
Any College/School	Text
Any Degree	Text

List View Columns	Field Type
Any Degree Type	Text
Any Department	Text
Any Division	Text
Any Education Institution	Text
Any Educational involvement	Text
Any Program	Text
Any Sub Department	Text
Primary Class of	#
Primary College/School	Text
Primary Degree	Text
Primary Degree Type	Text
Primary Department	Text
Primary Division	Text
Primary Education Institution	Text
Primary educational involvement	Text
Primary Program	Text
Primary Sub Department	Text

Giving Category Fields

List View Column	Field Type
First Gift	\$
First gift date	Date
First gift designation	Text
First gift type	Text
Largest gift	\$
Largest gift date	Date
Largest gift designation	Text
Largest gift type	Text
Latest gift	\$

List View Column	Field Type
Latest gift date	Date
Latest gift designation	Text
Latest gift type	Text
Philanthropic giving category	Text
Philanthropic giving confirmed	#
Philanthropic giving gift type	Text
Philanthropic giving gift year	#
Philanthropic giving high value	\$
Philanthropic giving identified	#
Philanthropic giving location	Text
Philanthropic giving low value	\$
Political donation gift amount	\$
Political donation gift date	#
Political donations confirmed	\$
Political donations identified	\$
Total giving	\$
Total number of gifts	#

Rating Group Fields

List View Columns	Field Type
Annual Giving Likelihood	#
Annuity Likelihood	#
Bequest Likelihood	#
CRT Likelihood	#
Major Giving Likelihood	#
Membership Likelihood	#
Online Giving Likelihood	#
Patient Response Likelihood	#
Planned Giving Likelihood	#

List View Columns	Field Type
Suggested Membership Level	\$
Suggested Membership Level Score	#
Target Gift Range	\$
Target Gift Range Score	#

Wealth Group Fields

List View Columns	Field Type
Business company valuation	\$
Business confirmed value	\$
Business identified value	\$
Business job title	\$
Estimated wealth value	\$
Income/compensation confirmed value	\$
Income/compensation identified value	\$
Last screening date	Date
Major giving capacity value	\$
Other assets confirmed value	\$
Property city	Text
Property county	Text
Property state	Text
Property valuation	\$
Property zip	#
Real Estate confirmed value	\$
Real Estate identified value	\$
Securities confirmed value	\$
Securities identified value	\$
Total Confirmed Assets	\$
Total Identified Assets	\$
Wealth indicators confirmed	#
Wealth indicators identified	#

Add a Research List

When you add a research list, you select the criteria you want used to build your group of constituents. Or, if you would rather, you can also create your list from a selection that was created in *Query*.

> Add a new research list

1. From *Prospects*, in the **Research Lists** section, click **Add**. The Add research lists screen appears.

Tip: You can also add a new research list from the Research Lists page.

2. In the **What is the criteria for creating your list?** section, you can build your list based on biographical and wealth fields available in **ResearchPoint**. For a list of fields included with each option, see [Research List Criteria Fields on page 13](#). This enables you to set rules as you go for which constituents you want to include in your list. No need to create a query in advance.

You add criteria one at a time. To add criteria, select one of the categories.



3. Then, choose which field in that category to search for and find constituent records that match

your criteria. After you enter your parameters for the field, click **OK**. You return to the add research list screen and your criteria appears.

With the red X and the pencil icons you can delete or edit if the parameters are wrong. Otherwise, continue to add as much criteria as you need.

4. In the **Do you need to further narrow your list?** section, you can base your list on a group of records created in *Query*. Click the **Selection Search** icon to locate an existing selection. You can create your research list using a combination research list criteria and a query selection.

Note: What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

5. Click the **Calculate total prospects** button at any time to see how many prospects satisfy your criteria. This can especially help you when you set criteria if you have a goal of how many prospects maximum should appear in your research list.
6. In the **Save options** section, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.

Note: Depending on your user role in the system, some options may be grayed out.

7. In the **Description** field, enter a description to help you identify the list. We recommend you summarize what criteria was used.
8. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.
9. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.
10. Decide if you want to allow others to access and/or edit this list.
11. To automatically update your research list to include new prospects satisfying your list criteria as they are added to your system, select **Allow this list to be refreshed**. You then determine how the list can be refreshed.
12. Click **Save**. Your new research list appears for you to start researching!

➤ Add a new prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **Add**. The Add research lists screen appears.
2. In the **What is the criteria for creating your list?** section, you can build your list based on fields selected from the various wealth and ratings categories available in **ResearchPoint**. For a list of fields included with each option, see [Research List Criteria Fields on page 13](#).

Tip: You can create your research list using a combination of both wealth and rating field criteria and a query selection. For example, if you have a selection that already includes all prospects with SC as their primary state, and you now want to further narrow the list to include primary SC prospects with an Annual giving likelihood equal to "4," rather than editing the existing selection to include the ratings criteria, you can use the selection to include only

primary SC prospects and then use the **Ratings** criteria button to include the Annual giving likelihood requirement.

3. In the **Do you need to further narrow your list?** you can base your list on a selection of records created in *Query*. Click the **Selection Search** icon to access the Selection Search screen and locate an existing selection.

Note: What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

4. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
5. In the **Save options** section, enter the following:

Note: Depending on your user role in the system, some options may be grayed out.

- a. In the **Name** field, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.
 - b. In the **Description** field, enter a description to help you identify the list.
 - c. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.
 - d. You can also allow other users the access and/or edit your list.
 - e. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.
 - f. Decide if you want to allow others to access and/or edit this list.
 - g. To make your list dynamic, which means it is automatically updated to include new prospects satisfying your list criteria as they are added to your system, select the **Allow this list to be refreshed** option and then select what exactly you want refreshed automatically.
6. Click **Save** to save the new list and return to the Research lists page.

Edit a Research List

You can easily edit an existing research list. You can update:

- Criteria options
- Selection files
- Name, Description, and Category information
- Access Permissions

However, you cannot edit refresh options.

➤ Edit a prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. Expand the list you want to edit.
3. Click Edit. The Edit research list screen appears.
4. In the **What is the criteria for creating your list?** section, you can build your list based on fields selected from the various wealth and ratings categories available in **ResearchPoint**. For a list of fields included with each option, see [Research List Criteria Fields on page 13](#).

Tip: You can create your research list using a combination of both wealth and rating field criteria and a query selection. For example, if you have a selection that already includes all prospects with SC as their primary state, and you now want to further narrow the list to include primary SC prospects with an Annual giving likelihood equal to "4," rather than editing the existing selection to include the ratings criteria, you can use the selection to include only primary SC prospects and then use the **Ratings** criteria button to include the Annual giving likelihood requirement.

5. In the **Do you need to further narrow your list?** you can base your list on a selection of records created in *Query*. Click the **Selection Search** icon to access the Selection Search screen and locate an existing selection.

Note: What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

6. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
7. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
8. In the **Save options** section, enter the following:

Note: Depending on your user role in the system, some options may be grayed out.

- a. In the **Name** field, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.
- b. In the **Description** field, enter a description to help you identify the list.
- c. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.
- d. You can also allow other users the access and/or edit your list.
- e. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.

- f. Decide if you want to allow others to access and/or edit this list.
 - g. To make your list dynamic, which means it is automatically updated to include new prospects satisfying your list criteria as they are added to your system, select the **Allow this list to be refreshed** option and then select what exactly you want refreshed automatically.
9. Click **Save** to save the new list and return to the Research lists page.

➤ Edit a prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. Expand the list you want to edit.
3. Click Edit. The Edit research list screen appears.
4. In the **What is the criteria for creating your list?** section, you can build your list based on fields selected from the various wealth and ratings categories available in **ResearchPoint**. For a list of fields included with each option, see [Research List Criteria Fields on page 13](#).

Tip: You can create your research list using a combination of both wealth and rating field criteria and a query selection. For example, if you have a selection that already includes all prospects with SC as their primary state, and you now want to further narrow the list to include primary SC prospects with an Annual giving likelihood equal to "4," rather than editing the existing selection to include the ratings criteria, you can use the selection to include only primary SC prospects and then use the **Ratings** criteria button to include the Annual giving likelihood requirement.

5. In the **Do you need to further narrow your list?** you can base your list on a selection of records created in *Query*. Click the **Selection Search** icon to access the Selection Search screen and locate an existing selection.

Note: What is a selection? A selection is a set of records, generally produced from a dynamic or static query. You can choose to use an existing selection to narrow your research list, or use query to create a new selection of records to narrow down your list.

6. Click the **Calculate total prospects** button at anytime to see how many prospects satisfy your criteria.
7. In the **Save options** section, enter the following:

Note: Depending on your user role in the system, some options may be grayed out.

- a. In the **Name** field, you must enter a name for your new list. The name appears in the **Research Lists** grid of the Research Lists page.
- b. In the **Description** field, enter a description to help you identify the list.

- c. The **Owner** field defaults to the current user. You can change this if you need to assign ownership to another user in your system.
 - d. You can also allow other users the access and/or edit your list.
 - e. If your organization uses categories to help identify lists, such as Alumni, New Parents, etc., you can also assign a **Category**.
 - f. Decide if you want to allow others to access and/or edit this list.
 - g. To make your list dynamic, which means it is automatically updated to include new prospects satisfying your list criteria as they are added to your system, select the **Allow this list to be refreshed** option and then select what exactly you want refreshed automatically.
8. Click **Save** to save the new list and return to the Research lists page.

Delete a Research List

You have the option to delete a research list from the Research Lists page or from the research list itself.

Warning: If you attempt to delete a research list on which **WealthPoint** updates have been performed, you cannot delete the group without first deleting the **WealthPoint** search history related to the research list.

➤ Delete a prospect Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. In the Research Lists grid, expand the list you want to delete.
3. Click **Delete**. A confirmation screen appears.
4. Click **Yes** to delete the group and return to the Research Lists page.

Open a Research List

➤ Open an existing Research List

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

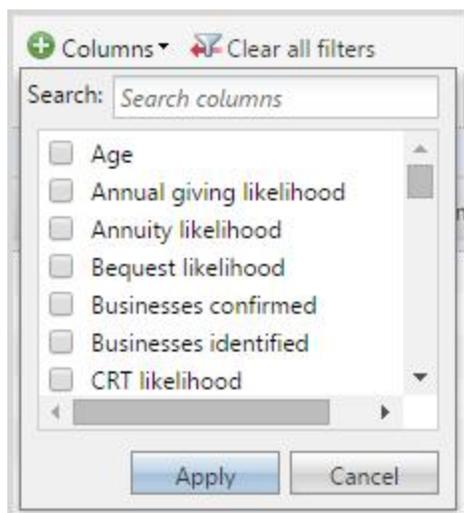
Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

Favorite lists		Records	Recently accessed lists		Records
All Prospects		0	Philanthropic Gifts (NOZA and DonorBank)		0
Business Ownership >=\$1M - Confirmed		0	NonProfit Affiliations (GuideStar)		0
Millionaires - Confirmed		0	Securities >= \$1M - Confirmed		0
Millionaires with >=\$5M - Confirmed		0	Millionaires - Identified		0
			All Prospects		0
View all favorite lists			View all recently accessed lists		

- From the Research Lists grid, in the **Name** column, click on the linked list name you wish to open. The selected research list appears.

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.



Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

Once you add and remove the columns you need, you can:

- Drag and drop columns to display the information in the order you want to see it. Click the column header and drag left or right to the position you prefer. Those that you don't need as often can be moved to the far right.

Tip: When you read information on a computer screen, you naturally read the far left side from top to bottom first, then across. Remember this when you choose which order to display your columns.

- Tighten up each column so the width of the column is consistent with the width of the data

included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.

- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel icon next to the column header name. 

Warning: Filters are sticky; they remain even after you navigate from the research list.

Once you get the columns customized to your needs, the application remembers your changes so you see the same view every time you access this list; however, if at any point you want to return the list view to the application's default settings. Under the **More** button, click the **Restore grid defaults**.

List Pagination

If your list contains more than 100 members, we paginate the records for you. Use the page links on the top right and bottom right of the page to navigate.



Use Search

Quickly search for content included in the **Members** list. The search is based on displayed columns. Add all columns you need before you perform the search.

Members List Links

When you add and remove columns from the **Members** list, you may notice some columns contain hyperlinks.

All name hyperlinks open the individual's wealth and ratings record. To navigate back to the research list quickly, from the Wealth Summary tab, under **Research details**, click the research list name or click your browser's back button.

The hyperlinks that appear for **Total confirmed assets** and **Total identified assets** columns, open a wealth summary screen.

How to Use Research Lists

Learn how to perform the following tasks on a research list:

- Add members to the list
- Edit the list configuration options
- Generate a research list report
- Delete the list
- Copy selected list members to another list
- Remove members

In this section:

Track Members of your List	31
Add Members to a Research List	32
Delete Members from a Research List	33
Copy List Members to a New or Existing Research List	33
View Members Prospect Records	34
Research List Report	34
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Track Members of your List

➤ **View members included in a research list**

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

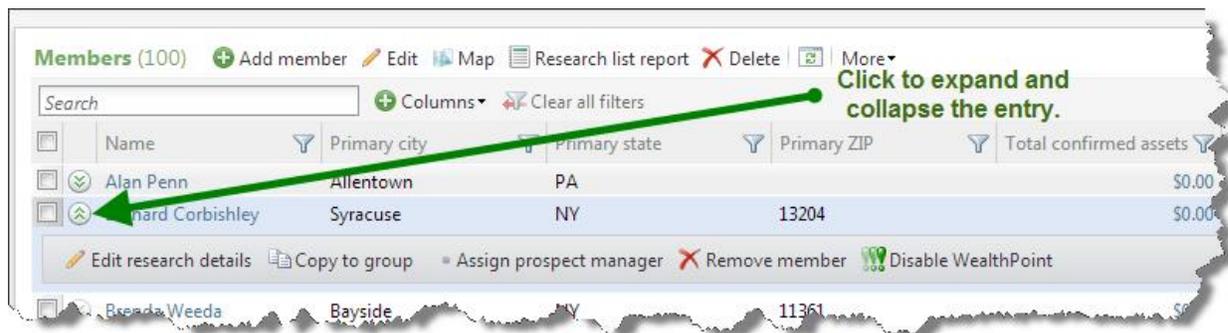
Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. In the **Research Lists** grid, click on the list you want to open. The selected list opens. The **Members** grid displays all prospects assigned this list.

Note: Options available in the **Members** grid are restricted based on user roles. If you do not see all options mentioned below, it is due to restrictions placed on your user role.

3. Expand a member entry to edit research details (such as research status and prospect manager), copy the prospect to another group, assign a prospect manger, delete the prospect from the list,

or disable WealthPoint screenings on this prospect.



For detailed instructions on filtering, searching, and arranging columns included in the Members grid, see [Display Tips for Members List on page 41](#).

Add Members to a Research List

After you create a list, regardless of the method or criteria used to populate the group, you can manually add individual members, even members not satisfying your original criteria.

From a research list, in the **Members** list, click **Add member**. The Add research list member screen appears.

Click the search icon to access the Individual Search screen. From here you can search for and select the new member. You can also add constitutes to your database from the search screen by clicking the **Add** button.

Once the new member has been selected or added, from the Add research list member screen, click **Save**. The new member is added to the list.

➤ Add individual members to an existing research list

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. Click **Add member**. The Add research list member screen appears.
4. Click the search icon to access the Individual Search screen. From here you can search for and select the new member. You can also add constitutes to your database from the search screen by clicking the **Add** button.
5. Once the new member has been selected or added, from the Add research list member screen, click **Select**. The new member is added to the group.

Delete Members from a Research List

After you create a list, regardless of the method or criteria used to populate the group, you can remove individual members.

From the research list, select the checkboxes for the members you want to remove. When you select the members, additional actions appear. Click **Remove member (# selected)**.

Warning: Do not select the **Delete** button at the top of the **Members** grid. This button deletes the entire list.

➤ Delete members from an existing list

1. From the top of the Prospects page, in the **Research Lists** section, click **View all lists**. The Research Lists page appears.

Note: You can also expand the **Research Lists** section and select a list you designated "Favorite" or select from a list of recently accessed lists.

2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to remove from the list.
4. Click **Remove member**. A confirmation screen appears.
5. Click **Yes** to remove the member.
OR
6. If you need to remove several members, in the **Members** grid, select the members you want to remove.
7. Near the top of the **Members** grid click **Remove member (number selected)**. A confirmation screen appears.

Warning: Do not select the **Delete** button at the top of the **Members** grid. This button deletes the entire list.

8. Click **Yes** to remove the selected members.

Copy List Members to a New or Existing Research List

You can copy one or a selected group of list members from your current research list to a new or existing research list. The list member retains membership on the current research list unless you decide to take action to remove.

Whether you copy one list member or several, you can search for and select an existing research list to copy the members to or you can create a new research list. The new research list has limited options but you can edit the name, description, owner, category, and whether others can access or edit the list. Once the new list is created, you can edit additional options.

➤ Copy One Member

From a research list, under **Members**, click the double arrows for a list member . An action bar appears for the constituent. Click **Copy to list**. The Copy prospects to list screen appears.

➤ Copy Selected List Members

If you need to copy several members, in the **Members** list, select the checkboxes for the members you want to include.

At the top of the **Members** list, click **Copy to list (number selected)**. The Copy prospects to list screen appears.

View Members Prospect Records

If while working in a research list, you need to access a member's prospect record, you can easily do so. Once in the prospect record, you can make and save any necessary changes and return to the research list.

To open the record, click on the member's name in the **Name** column of the **Members** grid.

Research List Report

The Research list report enables prospect researchers to prepare and print reports that include all members of a selected Research List.

Note: Report capacity is 500 records.

The report includes a detailed profile of each list member. In addition to the list member's name and contact information, the report includes:

- **Prospect Summary:** Primary business, birth, gender, and spouse information
- **Notes:** Any notations, media links, or attachments included on the Documentation tab of the prospect's constituent record

The details view of the report, accessed by clicking the **View details** link included on the report screen, includes additional information pulled from the prospect's constituent record, such as constituencies and relationship data.

➤ Generate a Research List report

From the research list, in the **Members** section, click **Research list report**.

Note: You can also generate a research list report from the Research Lists page by expanding the list you want to report on and clicking **Research list report**.

List Member Wealth Summary

Prospectors and fundraisers working in a list record can easily access additional wealth information on members.

To display the Wealth summary screen, click the link in the **Total confirmed assets** or **Total identified assets** columns.

If you click a link from the Wealth summary screen, the member's wealth and ratings record opens to the location where the information came. For example, if you want to view a member's real estate information in more detail, click the **Real estate** link in the **Assets** column. The list member's wealth and ratings record opens to the Assets tab with the **Real estate** section expanded.

The "New" icon identifies assets and indicators that have been updated since the last time this record was viewed.

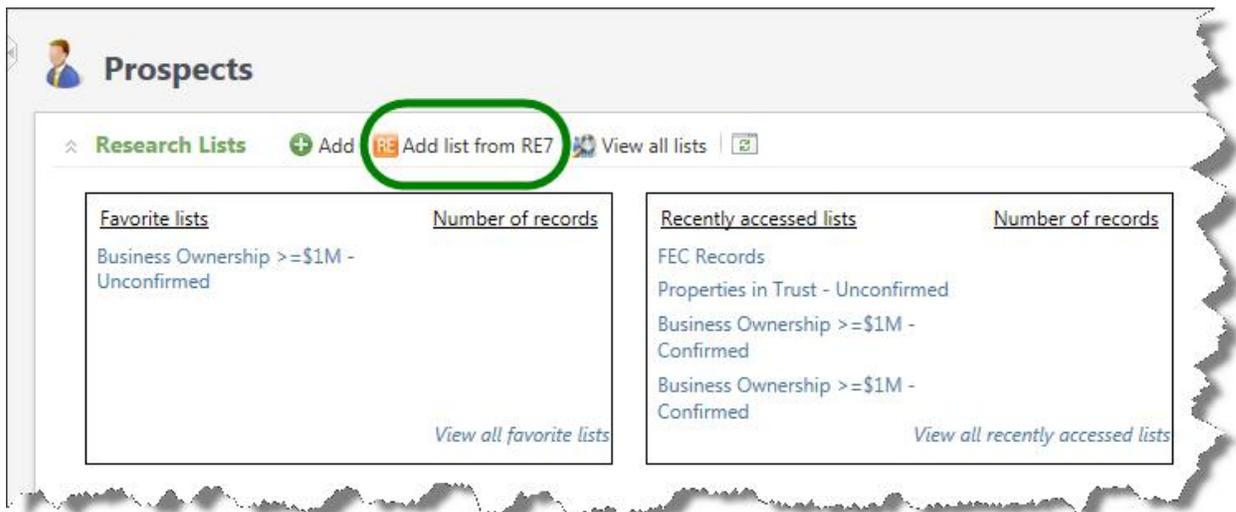
Import Research List from The Raiser's Edge

You can import **Raiser's Edge** query results into **ResearchPoint** lists.

When creating the **Raiser's Edge** query, make sure to include the system record ID as an output field. Any **Raiser's Edge** records that do not include a system ID do not import.

➤ Import a Raiser's Edge query as a ResearchPoint Research List

1. From the top of the **Prospects** page, click **Add list from RE7**. The Open Query screen appears.



2. Locate the **Raiser's Edge** query you want to import.
3. You can also opt to create a new query from the Open Query search screen. For information about creating queries, see the Query chapter in the *Query and Export Guide*.
4. Click **Open**. The Import group to screen appears.

5. Select how you want **ResearchPoint** to process the query records.
 - To create a new Research List using the query records, select **New Research List**. You then must enter a name and description for the new group.
 - To add the query records to an existing Research List, select **Existing Research List**. In the **Name** field, select the name of the existing Research List to which you want the records added.
6. Click **OK**.
7. The application searches the query for any **Raiser's Edge** records already linked to **ResearchPoint** records. Linked constituents are automatically added to the group. Any unlinked constituent are displayed in a screen.

Name	Address	City	State	Zip
Judy O' Brien	445 Church Street, Room 332	San Francis...	California	94114-...
Jose Ocampo	2675 Folsom Street	San Francis...	California	94110
Joe Oakey	111 McInnis Parkway	San Rafael	California	94903

8. Determine how you want these records handled:

- To add a record to the **ResearchPoint** database, select the record in the grid and click **Add**. This adds the selected constituent as a new record and creates a link back to the **Raiser's Edge** constituent record.
- To search the **ResearchPoint** database for a match, select the record in the grid and click **Search**. The Search screen appears, allowing you to search for an existing matching record. If you find and select a match, the selected record is linked to the **Raiser's Edge** constituent record.
- To add all records listed to the **ResearchPoint** database, select **Add all remaining records** and click **OK**. This adds all the remaining constituents as new records and creates links back to the **Raiser's Edge** constituent records.
- To not add any of the remaining records, select **Ignore all remaining** and click **OK**.

Manage Member Integration with The Raiser's Edge

If your organization uses Blackbaud's **The Raiser's Edge** 7.84 or higher and the programs are integrated, you can sync records with **The Raiser's Edge**, and link and unlink records with **The Raiser's Edge**.

Before you can use the **Raiser's Edge** features, your system must be integrated with a **Raiser's Edge** database and your credentials for the database must be entered.

Also, the **Raiser's Edge** integration features are role based. All roles except the Development Officer - View Only role allow access to the integration features.

Note: For more information about integrating with **The Raiser's Edge**, see the *Raiser's Edge Integration Guide*.

Link Group Members with The Raiser's Edge

If you integrate **ResearchPoint** with **The Raiser's Edge** (7.84 or higher), you can link constituent records stored in the two program databases. Once linked, you can sync up information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both application databases.

➤ Link a group member with a Raiser's Edge constituent

Before you can link records, you must set up the **Raiser's Edge** integration functionality.

For information about configuring your system to integrate with **The Raiser's Edge**, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to link.
4. Click **Link with RE7**.

Unlink Group Members from The Raiser's Edge

If you integrate **ResearchPoint** with **The Raiser's Edge** (7.84 or higher), you can link constituent records stored in the two program databases. If after linking constituents you discover an error or want to break the link for any reason, you can easily do so.

➤ Unlink a group member from a Raiser's Edge constituent

Before you can link or unlink records, you must set up the **Raiser's Edge** integration functionality.

For information about configuring your system to integrate with **The Raiser's Edge**, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to unlink.
4. Click **Unlink with RE7**.

Sync Group Members with The Raiser's Edge

If you integrate **ResearchPoint** with **The Raiser's Edge** (7.84 or higher), you can link constituent records stored in the two program databases. Once linked, you can sync up information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both application databases.

➤ Sync an individual group member with a Raiser's Edge constituent

Before you can link and sync records, you must set up the **Raiser's Edge** integration functionality.

For information about configuring your system to integrate with **The Raiser's Edge**, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. From the **Research Lists** grid on the Research Lists page, in the **Name** column, click on the list name you wish to open. The selected research list appears.
3. In the **Members** grid, expand the entry you want to sync.
4. Click **Sync with RE7**. The application syncs the records.

Sync Entire Group with The Raiser's Edge

If you integrate **ResearchPoint** with **The Raiser's Edge** (7.84 or higher), you can link constituent records stored in the two program databases. Once linked, you can sync up information stored on the two records, allowing you to maintain up-to-date information on any constituents stored in both

application databases. Using the **Sync with RE7** function, you can save time and sync all linked group members at once.

Note: For information about syncing one record at a time, see [Sync Group Members with The Raiser's Edge on page 38](#); for information about linking records, see [Link Group Members with The Raiser's Edge on page 37](#).

➤ Sync entire group with Raiser's Edge constituents

Before you can link and sync records, you must set up the **Raiser's Edge** integration functionality.

For information about configuring your system to integrate with **The Raiser's Edge**, see the *Raiser's Edge Integration Guide*.

1. From the Prospects page, under **Prospect Research**, click **Manage research lists**. The Research lists page appears.
2. At the top of the **Members** grid, click **Sync with RE7**. The application syncs all linked records included in the group.

Wealth and Ratings Management

Wealth information is data used to track your prospect's estimated wealth. Knowing the types and amount of wealth your prospects possess allows you to better determine cultivation strategies and determine the prospect's giving potential.

From a prospect's Wealth and Ratings screen, you can track a variety of wealth-related information, such as real estate and stock holdings, pension, and salary. If you subscribe to **WealthPoint**, the wealth screening solution from Target Analytics, you can also track imported **WealthPoint** data obtained by Target Analytics.

Tip: The **WealthPoint** service helps you identify your best major and planned gift prospects, attract and retain wealthy donors, maximize gifts, determine the wealth potential of your entire database, set reasonable campaign goals, and free up staff resources for person-to-person fundraising.

Note: For organizations, groups, and households, wealth information is arranged in the **Wealth summary** grid of the prospect's Wealth and Ratings screen.

For individual prospects, wealth information is arranged in a series of tabs that categorize the data collected.

- **Affiliations tab:** Houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies.
- **Assets tab:** Houses real estate, business, securities, and other asset ownership information, in addition to income and compensation data and wealth indicators.
- **Biographical Information tab:** Houses personal information, such as name, marital status, and gender; along with contact information, relationships, interests, and education.
- **Giving tab:** Houses the prospect's giving information, such as donations to your organization, philanthropic gifts to other organizations, and political donations.

- Model Scores tab: Contains an integrated analytics tool that helps identify prospects most likely to give a gift to your organization. It helps your organization predict actions including planned and recurring gifts, membership renewals, and which prospect will become a major donor.
- Wealth Summary tab: Summarizes all data contained on the Affiliations, Assets, Biographical, and Giving tabs in an organized, easy-to-read format.

Access the Prospect's Wealth and Ratings Record

We recommend you open a prospect's wealth and ratings record from the Home page with the one-stop prospect search.

1. From the Home page or from the *Prospects* page, under **Prospect research**, click **Search**. The Search page appears.
2. Select "Search saved prospects."
3. Enter the prospect's name or lookup ID and if known, the location.
4. Click **Search**. All available records in **ResearchPoint** that match your search criteria appear.
5. To open the record, click anywhere in the prospect's row or click **View RP**.
6. The prospect's Wealth and Ratings record appears.

Tip: You can also open the prospect's wealth and ratings record from your research lists.

The prospect search is also recommended for when you need to add new prospects to your database. Even if the prospect is known to you, adding through the Home page search, enables you to quickly see if the prospect is in your database before searching the Target Analytics Prospecting Database. To learn more, see the *One-Stop Prospect Search and Add Guide*.

Obtain Prospect Wealth Information

You can manually enter any wealth information you obtain about a prospect. Manually entering data simply involves [locating](#) the Wealth and Ratings page for an existing or a new prospect.

Warning: The **WealthPoint** search option is available for only individual constituents, not organizations, groups, or households.

The **Wealth summary** grid on this page displays links to all wealth information available. To manually enter data in any wealth category, click the link. For example, if you have real estate information you want to record, click the **Real estate** link in the **Assets** column.

If you subscribe to **WealthPoint**, Blackbaud's wealth screening solution, you can import **WealthPoint** data. When importing **WealthPoint** information, the system does not override any manually entered data you stored on a given prospect. For example, if you entered real estate information from Mark Adamson and real estate information is included in the **WealthPoint** import, whatever information you entered about Mr. Adamson remains intact after the import. This is also true of any information you manually edited or deleted.

If data is found in a **WealthPoint** update, the information displays in the **Wealth summary** grid of the Wealth and Ratings screen. The **Assets** rows display the total amount of wealth located for each asset.

This amount displays in the **Total identified** column. If "\$0" is recorded in this column, it means the service located data but an associated dollar amount did not exist.

Warning: The number of prospects included in any group you intend to update must be less than or equal to the number of searches remaining in your organization's **WealthPoint** subscription.

➤ Update individual prospect WealthPoint data

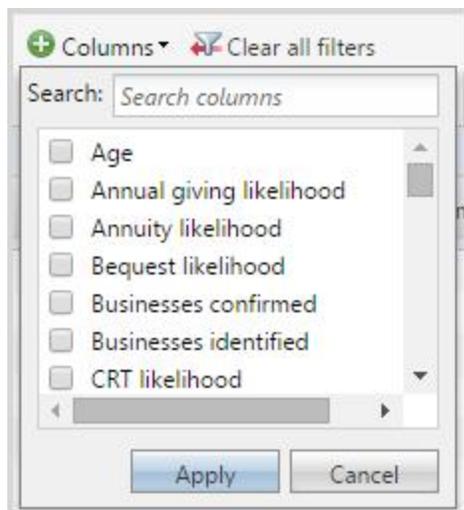
Warning: The **WealthPoint** search option is available for only individual constituents, not organizations, groups, or households.

There are couple ways to screen a prospect in **ResearchPoint**.

- When running a search of the Target Analytics Prospecting database (the "Find new prospects" option), click **Screen now** in the results grid to add and screen any new prospects.
- For an existing record, open the record and from the top of the Wealth Summary tab on the Wealth and Ratings page, click **Get WealthPoint screening**.

Display Tips for Members List

Our powerful list features enable you to filter and customize information included in the **Members** list. For example, the most powerful way to customize the **Members** list is to choose which columns display. To select which columns you want for the **Members** list, click the **Columns** dropdown.



Unselect any columns you do not want displayed and select those you do want to see in the data list. Click **Apply** and your changes display.

Once you add and remove the columns you need, you can:

- Drag and drop columns to display the information in the order you want to see it. Click the column header and drag left or right to the position you prefer. Those that you don't need as often can be moved to the far right.

Tip: When you read information on a computer screen, you naturally read the far left side from top to bottom first, then across. Remember this when you choose which order to display your columns.

- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this, hover your cursor on the column border until you see the resize width icon with an arrow on each side . Then, double-click your mouse. The columns tighten up. If this isn't satisfactory, you can specify the column width manually. Instead of double-clicking, drag and drop the column border into position.
- To allow even more space to view your column settings, you can also collapse the explorer bar on the left side of the application page. To collapse and expand the bar, click the small tab.



- To create columns of uniform size, under the **More** button, click **Autosize all columns**.
- To sort the list by the contents of a column, click the column header. Click again to switch between ascending and descending.
- To filter the list by the criteria for a specific column, click the funnel icon next to the column header name. 

Warning: Filters are sticky; they remain even after you navigate from the research list.

Once you get the columns customized to your needs, the application remembers your changes so you see the same view every time you access this list; however, if at any point you want to return the list view to the application's default settings. Under the **More** button, click the **Restore grid defaults**.

List Pagination

If your list contains more than 100 members, we paginate the records for you. Use the page links on the top right and bottom right of the page to navigate.



Use Search

Quickly search for content included in the **Members** list. The search is based on displayed columns. Add all columns you need before you perform the search.

Members List Links

When you add and remove columns from the **Members** list, you may notice some columns contain hyperlinks.

All name hyperlinks open the individual's wealth and ratings record. To navigate back to the research list quickly, from the Wealth Summary tab, under **Research details**, click the research list name or click your browser's back button.

The hyperlinks that appear for **Total confirmed assets** and **Total identified assets** columns, open a wealth summary screen.

Confidence Ratings

Each wealth record, whether imported from **WealthPoint** or manually entered, displays a confidence rating. It appears in the grid of the select data source page. For example, if you are looking at Securities data on the Assets tab, the **Confidence** rating column appears on the far right side of the **Securities** section.

✓ [check] icon = The information contained in the record is confirmed as correct.

★ [star] icon = **WealthPoint** used a piece of information in the recursive matching process to help identify a better match. For example, it locates a good Securities record match. It then uses the name of the company included in that record to make a better business ownership record match.

The rating indicates the relative strength of the match. For example, if confidence in the wealth information provided is very high, the rating number is "4"; if confidence in the wealth information provided is low, the rating number is "1". The following table explains each default confidence rating.

Rating	Description
5	Confirmed record – Any record confirmed in the application receives a 5 rating. You designate a record "Confirmed" by selecting the record and clicking the Confirm button. When you confirm a wealth information record, the Confidence number changes to "5" and a green check mark appears to the left of the selected entry.
4	Very high confidence
3	High confidence
2	Moderate confidence
1	Low confidence
0	Rejected record – Any record rejected in the application receives a 0 rating. You reject a record when you know for certain that the data does not belong to your constituent. You designate a record "Rejected" by selecting the record and clicking the Reject button. When you reject a wealth information record, the Confidence number changes to "0" and a red icon appears to the left of the selected entry.

View Wealth Summary Information

An overview of all wealth information lives on the prospect's **Wealth Summary** tab. The tab appears when you open a prospect.

The Wealth summary section of the tab offers a summary of all the prospect's wealth information, such as real estate, securities, and political donations. This section is view-only, but if you do need to access an asset or indicator, simply click the link provided in the grid. For example, if you need to view stock holding information, click **Securities**.

You can also review the giving capacity and research details for a prospect. If needed, you can edit the research details to update the research status, re-assign the prospect manager, or add a summary of your research.

In this section:

View Giving Capacity Information

Giving capacity information lives on the prospect's **Wealth Summary** tab in the Giving capacity section. The tab appears when you open a prospect.

From the **Giving capacity** section, you can view

- Capacity formula used to determine giving capacity
- Estimated wealth data
- Major giving capacity information
- Overall rating

Prospect Status, Manager, Group Association, and Summary Information

Research detail information lives on the prospect's **Wealth Summary** tab in the **Research details** section. This tab appears when you open a prospect.

From the **Research details** section of the prospect's Wealth and Ratings page, you can track prospect status information, managers assigned prospects, research lists to which the prospect is associated, and any research summary data.

➤ Edit the prospect manager assigned a prospect

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Research details** grid, click **Edit**. The Edit research details screen appears.
3. In the **Prospect manager** field, enter the new manager you want assigned this prospect.
4. Click **Save** to save the change.

➤ Edit a Prospect's Research Status

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Research details** grid, click **Edit**. The Edit research details screen appears.
3. In the **Research status** field, enter the prospect's new status.
4. Click **Save** to save the change.

➤ Edit Prospect Research Summary Information

1. Open a prospect record. The Wealth and Ratings screen appears displaying the Wealth Summary tab.
2. In the **Research details** grid, click **Edit**. The Edit research details screen appears.

3. In the **Research summary** field, enter any summary information.
4. Click **Save** to save the change.
5. Summary data displays in the **Research Summary** section of the Wealth Summary tab.

Model Scores and Ratings

A model score is an integrated analytics tool that identifies prospects most likely to give a gift to your organization. It helps your organization predict actions such as planned and recurring gifts, membership renewals, and what constituents will become major donors.

Models are scored on a range from 0-1000. Scores are determined by organization name, organization address and gift transaction file, demographic data, and public wealth data. Organizations can use Blackbaud's model scores, as well as create their own scores.

From a prospect's [Wealth and Ratings screen](#), the Model Scores tabs display the **Model scores and ratings** list. In addition, the Wealth Summary tab displays the top seven scores under **Model scores and ratings**. To view all scores, click **View details**, and the Model Scores tab opens.

Note: If a constituent has no scores or ratings, the **Model scores and ratings** section does not appear on the Wealth Summary tab.

Prospect Asset Information

The Assets tab on a prospect's Wealth and Ratings screen houses information about the prospect's real estate, business, stock, and "other" assets. It also includes wealth indicator and income/compensation information.

To access this tab, run a prospect search for the record for which you want to view asset information. The prospect's Wealth and Ratings page appears. Select the Assets tab.

Note: For organizations, households, and groups, asset information is accessed from the Wealth Summary tab on the prospect/household/group's Wealth and Ratings page.

The top of the tab provides a summary of all data included on the tab. For example, total identified real estate, businesses, and securities holdings.

Also in the summary section on this page:

- Click any link in the **Wealth assets** grid and the application takes you to that section of the tab page. For example, if you want to view the real estate information, click **Real estate** in the summary section, and you are taken directly to the **Real estate** section on the tab.

The bottom half of the tab displays asset details, such as wealth indicators, income/compensation information, and stock holdings.

In this section:

Real Estate Information

For individuals, the Real estate section of the Assets tab tracks all real estate holdings located for this prospect.

For organizations, groups, and households, the Wealth and Ratings - Real Estate page tracks all real estate holdings located for this prospect/household.

This section/page also stores information from the CoreLogic Data Services real estate data source imported from **WealthPoint**.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Business Ownership Information

For individuals, the Businesses section of the Assets tab tracks all business ownership data located for this prospect.

For organizations, groups, and households, the Wealth and Ratings - Business page tracks all business ownership data located for this prospect/household.

This section/page displays the company value and the ownership value assigned your prospect. The section also stores information from the Dun & Bradstreet data source imported from **WealthPoint**.

WealthPoint leverages three files from D&B to provide you with data about the constituent's employer, position, career history, and compensation.

- Private Company Stock Ownership: This provides stock ownership information about private companies. With this information, you can see how much of a business your potential donor owns.
- Management Biographies: This source provides career history, compensation data, and stock information on more than 1,000,000 executives.
- Executives at Home: Private company owners and professionals make up over 75% of all millionaires. The Executives at Home file provides access to the names and addresses of 8,000,000 executives.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Securities

For individuals, the Securities section of the Assets tab tracks stock holdings located for this prospect.

For organizations, groups, and households, the Wealth and Ratings - Securities page tracks all stock holdings located for this prospect/household. The section also stores information from Thomson Reuters imported from **WealthPoint**.

The SEC Stock Information by Thomson Reuters file includes stockholding information on public company officers, directors, and major shareholders. You are provided with the latest holdings, stock type, and type of ownership.

In addition, Target Analytics obtains stock prices from **BATS Exchange**, a securities trading company that provides up-to-date trade information at the close of each trading day. This updated data is reflected in the application whenever a new wealth search returns security information or a security transaction updates through a **Data Refresh**. The new price is included in the **Direct holdings value** and **Indirect holdings value** columns displayed on the Securities page. It is also included in the price information displayed in the **Details** pane of the Securities page.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Transaction Page

A prospect's transactions page lists all security transactions entered in the system, including the quantity of shares owned, transaction date, share price, transaction value and more. From the **Show** field on the page, you can filter the transactions displayed. After selecting a **Show** option, click **Apply** to update the view.

To access a transaction page, from the prospect's Wealth and Ratings screen, click **Securities** in the **Wealth summary** grid. The constituent's Securities page appears.

Note: For organizations, households, and groups click **Securities** in the **Wealth summary** section of the Wealth and Ratings screen.

In the grid, click the **Issuer name** entry for which you want to view transaction information.

➤ Add new transaction to an existing securities record

1. From the prospect's Wealth and Ratings screen, click **Securities** in the **Wealth summary** grid. The constituent's Securities page appears.

Note: For organizations, households, and groups click **Securities** in the **Wealth summary** section of the Wealth and Ratings screen.

2. In the grid, click the entry to which you want to add transaction information.
3. Click **Add**. The Add security transactions screen appears.
4. Click **Save** to save the entry and return to the transactions page.

Wealth Indicators

For individuals, the Wealth indicators section of the Assets tab tracks the prospect's general wealth indicators.

For example, the presence of luxury items like luxury automobiles, yachts, and private planes; or a high-balance personal retirement (Keogh) plan indicate wealth. The page also stores information from Larkspur imported from **WealthPoint**.

Larkspur compiles wealth indicators from over 70 different data sources and isolates 3.4 million high net-worth individuals nationwide.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Income/Compensation

For individuals, the Income/Compensation page on a constituent tracks the constituent's salary, bonuses, stock options, etc.

For organizations, groups, and households, the Wealth and Ratings - Income/Compensation page tracks the prospect/household's salary, bonuses, stock options, etc. The page also stores information from Thomson Reuters imported from **WealthPoint**.

Thomson Reuters provides comprehensive biographical and financial information on officers and directors of over 20,000 companies worldwide. Insider data includes officer and board of director names, biographies, compensation, and stock options for over 9,000 U.S. public companies.

At the top of the page, you can filter information to display by selecting a specific **Source**, **Confidence** rating, or **Match code**.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Other Assets

For individuals, the Other assets page on the constituent tracks additional constituent assets not covered in the standard data source options, such as a collector car or coin collection.

For organizations, groups, and households, the Wealth and Ratings - Other Assets page tracks additional prospect/household assets not covered in the standard data source options.

At the top of the page, you can filter information to display by selecting a specific **Source** or **Confidence** rating.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Prospect Giving Information

The Giving tab on a prospect's Wealth and Ratings screen, houses information about the prospect's giving to yours and other non-profit organizations.

To access this tab, run a prospect search for the record for which you want to view asset information. The prospect's Wealth and Ratings page appears. Select the Giving tab.

Note: For organizations, households, and groups, asset information is accessed from the Wealth Summary tab on the prospect/household/group's Wealth and Ratings page.

The top of the tab provides a giving summary of all data included on the tab. For example, you can view how many gifts were given to your organization.

Also in the summary section on this page:

- Click any link in the **Giving summary** grid and the application takes you to that section of the page. For example, if you want to view the gifts given to other organizations, click **Philanthropic gifts** in the summary section, and you are taken directly to the **Philanthropic gifts** section on the tab.
- View the **Philanthropic giving category breakdown** grid to see a percentage and number breakdown of this prospect's giving tendencies based on giving categories associated with the donations. You can filter the data considered for this breakdown based ratings assigned each gift. For example, you can select to include "Confirmed only" gifts or gifts with a rating of "1 and above." The percentage information displays to the left of the category title and the number of gifts displays to the right of the category title.

In this section:

Giving to My Organization Information

For individuals, the Giving to my organization section of the Giving tab tracks the prospect's gifts to your organization. If the information is incorrect, click **Clear** to remove the information.

➤ Add Giving to my organization information

1. From the prospect's [Wealth and Ratings](#) page, select the Giving tab.
2. In the **Giving to my organization** section, click **Add**. The [Add giving to my organization](#) screen appears.
3. From here you can enter:
 - Total giving amount: The total of all gifts given to your organization by this prospect as of the **Last updated date** displayed at the top of the tab.
 - Total number of gifts number: The total number of gifts given to your organization by this prospect as of the **Last updated date** displayed at the top of the tab.
 - And information about the Largest, First, and Latest gifts: These sections set the properties for the largest, first, and latest gift given to your organization by this prospect. In each section, select:
 - Type:** Type of gift, such as "Funds," "Materials," "Volunteer, "
 - Designation:** Where the money is going to go or how it's going to be used, such as an unrestricted annual fund or a specific endowment fund. Each designation is mapped to an account in the ledger.
 - Amount:** Value of gift
 - Date:** Date gift made
4. To save your entry and return to the Giving tab, click **Save**.

Philanthropic Gift Information

For individuals, the Philanthropic gifts section of the Giving tab tracks all the prospect's charitable giving, including gift range and year information.

For organizations and households, the Wealth Details - Philanthropic page tracks all charitable giving located for this prospect/household. The section also stores information from NOZA, Inc. imported from **WealthPoint**.

Note: An "*" in the **Name** field indicates the individual is deceased.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Political Donations

For individuals, the Political donations section of the Giving tab tracks all the prospect's political giving, including amount and year information.

For organizations, groups, and households, the Wealth and Ratings - Political Donations page tracks all political giving located for this prospect/household. The page also stores information from Federal Elections Commission imported from **WealthPoint**.

The Federal Elections Commission database contains detailed information about 2,000,000 federal election contributions. This information includes the amount of the contribution and the recipient of the contribution.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Wealth Affiliations

The Affiliations tab on a prospect's Wealth and Ratings screen houses information about the prospect's non-profit and foundation affiliations, in addition to network connections and constituencies. A constituency defines the affiliation a constituent has with your organization. For example, the constituent may be a volunteer or member. "Volunteer" and "member" are common constituent constituencies.

To access this tab, run a prospect search for the record for which you want to view asset information. The prospect's Wealth and Ratings page appears. Select the Affiliations tab.

Note: For organizations, households, and groups, asset information is accessed from the Wealth Summary tab on the prospect/household/group's Wealth and Ratings page.

The top of the tab provides a summary of all data included on the tab. For example, you can view how many affiliations have been identified for each affiliation type.

Also in the summary section on this page:

- Click any link in the **Affiliations summary** grid and the application takes you to that section of the tab page. For example, if you want to view the network connections included in this affiliations record, click **Network connections** in the summary section, and you are taken directly to the **Network connections** section near the bottom of the tab page.
- View the **Relationship Map** to track all relationships this constituent has with other constituents in your system.

The bottom half of the Affiliations tab displays affiliation details, such as non-profit and foundation affiliations.

In this section:

Nonprofit Affiliations Information

For individuals, the Non-profit Affiliations section of the Affiliations tab tracks the prospect's relationship with nonprofit organizations.

For organizations, groups, and households, the Wealth and Ratings - Nonprofit Affiliations page tracks the prospect/household's relationships with nonprofit organizations.

It also stores information from [GuideStar](#) imported from **WealthPoint**.

GuideStar scans the names of 220,000 nonprofit board members and executives from 275,000 organizations and extracts information such as nonprofit organization name, affiliation, and address of the donor.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Foundations

For individuals, the Foundation affiliations section of the Affiliations tab tracks the constituent's association with nonprofit foundations.

For organizations, groups, and households, the Wealth and Ratings - Foundation Affiliations page tracks the prospect/household's association with nonprofit foundations.

It also stores information from GuideStar.com imported from **WealthPoint**.

GuideStar.com information includes the foundation name and address and total assets (fair market value) along with the constituent's title and compensation.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Network Connections

Network connections displays the names of organizations with a confirmed relationship with the prospect. If the individual is a constituent in your database, the name is italicized; if the individual is a constituent in your database and has a formal relationship with the selected constituent, the name is bold and italicized.

When you screen a prospect through **WealthPoint**, the constituent information from your database is matched against businesses and organizations in the **WealthPoint** database that they may have an involvement with. After a record is matched, the application determines who else in the **WealthPoint** database the associated prospect may have relationships with. The application returns the organizational and individual relationships, which appear in the **Network connections** section of the prospect's Affiliations tab. These relationships can include people associated with the same nonprofit or foundation as board members, directors, or trustees; or business partners associated as colleagues or co-executives. Because of your relationship with the initial prospect, you may be able to add to your donor pool by reaching out to these extended relationships.

For information about managing your columns and filtering and searching content in the grid, see [Display Tips for Members List on page 41](#).

Constituencies

Constituencies define the affiliations your prospects have with your organization. A prospect can have multiple constituencies, and these relationships can start and end and overlap. For example, a prospect may first become a donor in your database and remain a donor for an undetermined length of time. The prospect may later become a volunteer for your organization but for only six months. You can use constituencies to define these relationships and group similar prospects in queries and reports.

To view the constituencies of a prospect, select the **Constituencies** section of the Affiliations tab on the prospect's [Wealth and Ratings screen](#).

Biographical Information

Warning: Biographical information displays for only individual constituents, not organizations, groups, or households.

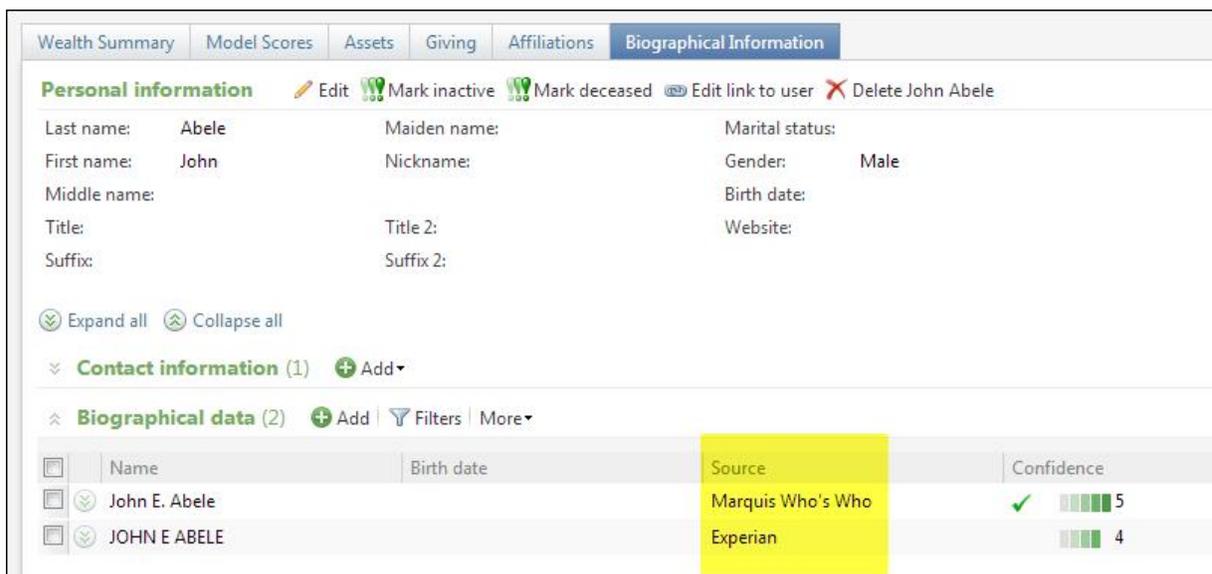
The Biographical Information tab on a prospect's Wealth and Ratings screen houses a wealth of personal information.

- Contact information: address, address type, do not send mail, this address is confidential, seasonal information
- Biographical data: information imported through WealthPoint from Marquis Who's Who
- Relationships
- Interests
- Educational institutions
- Educational involvements
- Attributes
- Supporting information: notes, media links, attachments
- Demographics: target gift range, income, birthplace, religion, ethnicity
- Alternate lookup IDs
- Aliases

Note: The Who's Who data source includes detailed biographical information on over 1,000,000 individuals. To obtain this information, Marquis matches the **WealthPoint** file against 20 volumes, including all regional publications: Who's Who in Finance & Industry, Who's Who of Emerging Leaders in America, and Who's Who in America.

➤ **View prospect biographical information imported from Marquis Who's Who or Experian**

1. From the prospect's [Wealth and Ratings](#) page, select the Biographical Information tab.
2. Expand the **Biographical data** section. All existing records display.
3. The **Source** column displays from which data source the information was gathered.



- Expand any record to view record details. From the expanded view, you can also confirm, reject, edit, or delete the data.

Tip: Experian data is compiled from a combination of over 300 public and proprietary sources. The sources are compiled to produce final biographical details for each unique individual. Additional values are composed by modeling marketing database elements.

Prospect Research Report

The Prospect Research Report provides details about a selected prospect's wealth information. To access the report, click the **Prospect research report** link under **Reports** on the prospect's Wealth and Ratings page. Once the Prospect Research Report page appears, use the grid at the top of the page to select what information you want to include in the report.

You can base your report on a selected **Confidence** rating and selected report template. To use only selected sections defined in your template, in the **Report template** field at the top of the report page, select the template you want to use.

Note: The **Print** functionality on this report is an activeX control that works only in **Internet Explorer**. If working in another browser, [export](#) the report to a PDF to print.

Tip: The **Prospect Research Report** is available for only individual constituents, not organizations.

Export a prospect research report to an outside application

- Run the [Prospect Research Report](#).
- At the top of the report page, click the drop-down menu next to the **Export** icon.

3. Select the export option. For example, you can select "CVS" if you want to export to Excel or Acrobat (PDF) file.

Prospect Research Request Management

The prospect research request tools allow you to submit a prospect research request; designate the search for a specific record type (constituent, organization); enter request information such as priority, type of research, reason for request, and much more; and track the results.

Add New Prospect Research Requests

When you add a prospect research request, your request is submitted to a research officer for approval and completion.

➤ Add a New Prospect Research Request

1. From the Prospect Research page, select the Research requests tab and click **Add** or from the Prospects page, under **Prospect research**, click **Add a prospect research request**.
2. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.

Add a prospect research request

Status: Priority:

Record type: Due date:

Research group to include in request: Research type:

Request reason:

Requested by:

Submitted by:

Prospects to research:

Prospect
Michael S. Dell
Jeffrey H. Brotman
Warren E. Buffett
Charles Schwab

Notes:

3. Select the **Record type** for which you are requesting information: Individual, Research List, or Organization.
4. Depending on the **Record type** selected, you next must select the individual, organization, or Research List for which you want information.

Warning: The Individual, Research List, or Organization for which you are requesting information must exist in your database before you can create a prospect research request.

5. Enter any additional information required for the request, such as a priority, due date, and reason.

➤ Add a Prospect Research Request Screen Fields

Screen Item	Description
Status	If you are creating a new request, "New" defaults in this field and cannot be changed. After the request is saved, the status is changed to "Pending." This field displays the current status of your request and cannot be edited from the Research Request tool.
Record type	The available record types on which to base your request are. For example, a constituent or a Research List.
Research List to include in request	If in the Record type field you select Research List a new field appears. Select the group you want to research. All prospects included in the group display in the Prospect names grid. The number of constituents included in the grid is capped at 500.
Prospects to research	<p>If in the Record type field you selected "Individual" or "Organization," in this field enter or search for the existing individual or organization constituent you want to include in your research request. Click the search icon in the field to access the search screen if you want to search for the constituent. You can enter multiple constituents in this grid.</p> <p>If in the Record type field you selected "Research List," the constituents included in the Research List populate the grid. To remove a constituent, select the constituent name and click DELETE on your keyboard.</p>
Priority	Select a priority for the request. Priorities are created in Code tables in <i>Administration</i> .
Due date	Select a date by which you need the requested information. The default date is two weeks from the current date.
Research Type	Select the type of information you need on the constituents. For example, "Full Profile" or "Financial Profile." Types are created in Code tables in <i>Administration</i> .
Request Reason	Select a reason for the request. Reasons are created in Code tables in <i>Administration</i> .
Requested by/Submitted by	<p>Enter or select the names of the individuals requesting the information. Click the search icon in the respective field to access the Constituent search screen.</p> <p>Both fields default to the constituent name linked to the application user entering the request, but the entries can be changed.</p>
Notes	Enter any additional information you want to include with the request.
Copy research request information to linked individual requests	Select this option if you want linked individual requests to be updated to match the main request.

Add a new prospect research request from the Prospect Research page

1. From the Prospect Research page, select the Research requests tab and click **Add** or from the Prospects page, under **Prospect research**, click **Add a prospect research request**.
2. The Add a prospect research request screen appears. The fields included on this screen may vary slightly based on the **Record type** you select.

Add a prospect research request

Status: Priority:

Record type: Due date:

Research group to include in request: Research type:

Request reason:

Requested by:

Submitted by:

Prospects to research:

Prospect
Michael S. Dell
Jeffrey H. Brotman
Warren E. Buffett
Charles Schwab

Notes:

3. Select the **Record type** for which you are requesting information: Individual, Research List, or Organization.
4. Depending on the **Record type** selected, you next must select the individual, organization, or Research List for which you want information.

Warning: The Individual, Research List, or Organization for which you are requesting information must exist in your database before you can create a prospect research request.

5. Enter any additional information required for the request, such as a priority, due date, and reason.

Add a Prospect Research Request Screen

Screen Item	Description
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Status	If you are creating a new request, "New" defaults in this field and cannot be changed. After the request is saved, the status is changed to "Pending." This field displays the current status of your request and cannot be edited from the Research Request tool.
---------------	--

Screen Item	Description
Record type	The available record types on which to base your request are. For example, a constituent or a Research List.
Research List to include in request	If in the Record type field you select Research List a new field appears. Select the group you want to research. All prospects included in the group display in the Prospect names grid. The number of constituents included in the grid is capped at 500.
Prospects to research	<p>If in the Record type field you selected "Individual" or "Organization," in this field enter or search for the existing individual or organization constituent you want to include in your research request. Click the search icon in the field to access the search screen if you want to search for the constituent. You can enter multiple constituents in this grid.</p> <p>If in the Record type field you selected "Research List," the constituents included in the Research List populate the grid. To remove a constituent, select the constituent name and click DELETE on your keyboard.</p>
Priority	Select a priority for the request. Priorities are created in Code tables in <i>Administration</i> .
Due date	Select a date by which you need the requested information. The default date is two weeks from the current date.
Research Type	Select the type of information you need on the constituents. For example, "Full Profile" or "Financial Profile." Types are created in Code tables in <i>Administration</i> .
Request Reason	Select a reason for the request. Reasons are created in Code tables in <i>Administration</i> .
Requested by/Submitted by	<p>Enter or select the names of the individuals requesting the information. Click the search icon in the respective field to access the Constituent search screen.</p> <p>Both fields default to the constituent name linked to the application user entering the request, but the entries can be changed.</p>
Notes	Enter any additional information you want to include with the request.
Copy research request information to linked individual requests	Select this option if you want linked individual requests to be updated to match the main request.

Manage Prospect Research Requests

Prospect research requests inform individuals in your organization responsible for prospect research that you need more information on a specific constituent or members of a Research List. The request form allows you to enter details including priority, reason, and notes to justify your request. Once the request is created and saved, the individuals responsible for prioritizing the requests can access and act upon the request. The individual responsible for submitting or requesting the research can track its progress from the Research Requests tab on the fundraiser record.

To access your fundraiser record, from Prospects, click **My fundraiser page**.

The **Research requests** grid at the top of the tab summarizes each request, displaying date, status, record type, number of constituents, type of research requested, and researcher information. The detail view near the bottom half of the tab displays all information included on the request form, such as priority and submitted by.

Edit an Existing Research Request

After you create and submit a research request, you can easily make any necessary changes to the request from the Research Request page. This page appears after you save a request or you can access it at any time from your fundraiser page.

To access the research request record, from the Prospects page, click **My fundraiser page** under **Prospect management**. Your Fundraiser page appears displaying all research requests associated with your record. To edit a record, expand the record you want to change, and click **Edit**. The Edit a prospect research request screen appears.

Note: Existing notes on individuals will not be overwritten.

Cancel an Existing Research Request

After you create and submit a request, you can cancel the entire request. This keeps the request in your system but changes the status to "Canceled."

Warning: After you cancel a request, the cancel action cannot be undone.

To cancel an existing prospect research request, from the Prospects page, click **My fundraiser page** under **Prospect management**. Your Fundraiser page appears displaying all research requests associated with your record. Expand the record you want to cancel, and click **Cancel**. A confirmation screen appears. Select a **Reason** for canceling the request and enter any necessary **Comments**. Reasons are created in **Code tables** in *Administration*. Click **Save** to complete the process.

View Research Requests

After you submit a research request, the Research Request record appears. From this page you track activity on your request. After leaving this page, you can return to it through your fundraiser record.

From the Prospects page, click **My fundraiser page**. All requests you submitted or requested display in the **Research requests** grid. Click on the request you want to open.

From here, you can view the **Due date** and **Status** of your request.

Track Prospect Request Status

From the Prospects page, click **My fundraiser page**. All requests you submitted display in the **Research requests** grid. The request **Status** displays in the **Research request** grid next to the **Request ID**.

Export Research Requests

From the Prospects page, click **My prospect research page**. All requests you submitted display in the **Research requests** grid.

At the top of the page, click **More** and select your download option.

Prospect Analysis

Prospect Analysis tools can help Development Officers determine who and how much to ask for a gift. The prospect segmentation report is used to segment constituents in your database, identifying prospects that satisfy specified modeling scores or ratings and aiding in the development of a cultivation strategy for each segment created.

The prospect segmentation report's cross tab functionality shows all giving potential options held by your constituents. It places constituents in the report cell, which carries the highest matched rating range. In addition, a constituent can exist in multiple cells, if you design the report using two secondary variables. When this occurs, the constituent appears in the best of these possible cells. The cell with the best rating displays in the lower, right corner of the report.

Access Prospect Analysis

You access the **Prospect Analysis** functionality from the Prospects page by clicking **Prospect analysis** under **Research tools**. The Prospect analysis page appears displaying any existing prospect analysis definitions.

➤ View a prospect analysis dashboard

1. From the Prospects page, click **Prospect analysis** under **Research tools**. The Prospect analysis page appears displaying any existing prospect analysis definitions.
2. From the Prospect Analysis page, in the **Prospect analysis dashboards** grid, select the dashboard you want to view.

➤ Export a selected prospect analysis dashboard to another format

1. From the dashboard, at the top of the page, click the **Export** icon to access a drop-down menu.
2. Select your export format: CSV or XLSX.

View Segment Page

A segment page displays the selected segment's properties; date, source, owner, and description information; and a list of the prospects included in the selected segment.

➤ Access Segmentation Page

From a prospect segmentation dashboard, you can access a segment page for a selected segment in the dashboard.

For example, a segmentation dashboard includes a row for annual giving likelihood scores of 0-300 and an intersecting column for planned giving likelihood scores of 600-1000.

		Planned giving likelihood		
		PGL 0-299	PGL 300-599	PGL 600-1000
Annual Giving Likelihood	AGL 0-300	5	789	512
	AGL 301-600	643	4313	213
	AGL 601-1000	1081	241	3

Click on the number included in this segment block to access the segment page displaying prospects satisfying the variable scores.

➤ Save Segment Prospects to Research List

You can save all prospects in a selected segment to a new or existing Research List.

1. From the segmentation dashboard, open the segment page.
2. Click **Save constituents** and select **Research List**. The Save constituents to Research List screen appears.

Save constituents to research group [X]

Create new research group

Name:

Description:

Add to existing research group

Name: 🔍

3. To save the prospects to a new Research List, select **Create a new Research List** and enter a name and description.
4. To add the prospects to an existing Research List, select **Add to existing Research List** and click

the binoculars in the **Name** field to search for the Research List you want to use.

5. Click **Save**.

➤ Save Segment Prospects to Selection

You can save all prospects in a selected segment to a new or existing Research List.

1. From the segmentation dashboard, open the segment page.
2. Click **Save constituents** and select **Selection**. The Save constituents to selection screen appears.

3. Enter a name and description.
4. You can also choose to make the new selection available for use in Query Designer and to overwrite any existing selection that shares this selection name.
5. Click **Save**. The next time you visit **Query**, the new selection displays in the **Constituent** frame of the Selections tab.

Access Segmentation Page

From a prospect segmentation dashboard, you can access a segment page for a selected segment in the dashboard.

For example, a segmentation dashboard includes a row for annual giving likelihood scores of 0-300 and an intersecting column for planned giving likelihood scores of 600-1000.

Prospect segmentation		Planned giving likelihood		
		PGL 0-299	PGL 300-599	PGL 600-1000
Annual Giving Likelihood	AGL 0-300	5	789	512
	AGL 301-600	643	4313	213
	AGL 601-1000	1081	241	3

Click on the number included in this segment block to access the segment page displaying prospects satisfying the variable scores.

➤ **Open a prospect's constituent record from the Segment page**

1. From the segmentation dashboard, open the segment page.
2. In the **Segment prospects** grid, in the **Name** column, select the prospect you want to open.

Target Analytics Model Scores and Ratings Results

On the Target Analytics Model Scores and Ratings Results page, you can view model score projects and presentations uploaded from Target Analytics. This page provides a comprehensive view of model scores and ratings details. A project consists of a model score or group of model scores accompanied by presentations and charts to help nonprofit organizations understand those scores.

You can view model scores and ratings details such as the number of constituents with scores, model score descriptions, and whether the scores were recalibrated. You can also view presentation files such as PowerPoint presentations.

To access the page, go to *Prospects* and click **Target Analytics model scores and ratings results**.

Target Analytics Model Scores and Ratings Results

Model score results presentations

9/10/2012

Recalibration:	No
Total number of records scored:	100,000
Description:	Annual Giving Likelihood Major Giving Likelihood Planned Giving Likelihood
Presentation files:	2012Q3Interactions.docx ModelScoresandRatings.pptx

9/6/2012

Recalibration:	Yes
Total number of records scored:	20,000
Description:	Likelihood to Give Principal Giving Solution Annuity Likelihood CRT Likelihood Bequest Likelihood Alumni Engagement Likelihood Membership Likelihood
Presentation files:	2012Results.pptx

Prospect Research Report Templates

Prospect Research Report templates enable 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**.

> 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**.

> 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.

> 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.

ResearchPoint 4.91 Development Officer - Advanced Rights US

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